

2020 State of Customer Journey Management & CX Measurement

Insights and trends from 1,050+ CX leaders worldwide



Pointillist®

About This Report

Customer experience is more important than ever in 2020. But what makes some organizations more effective than others at managing customer journeys, measuring outcomes and improving experiences?

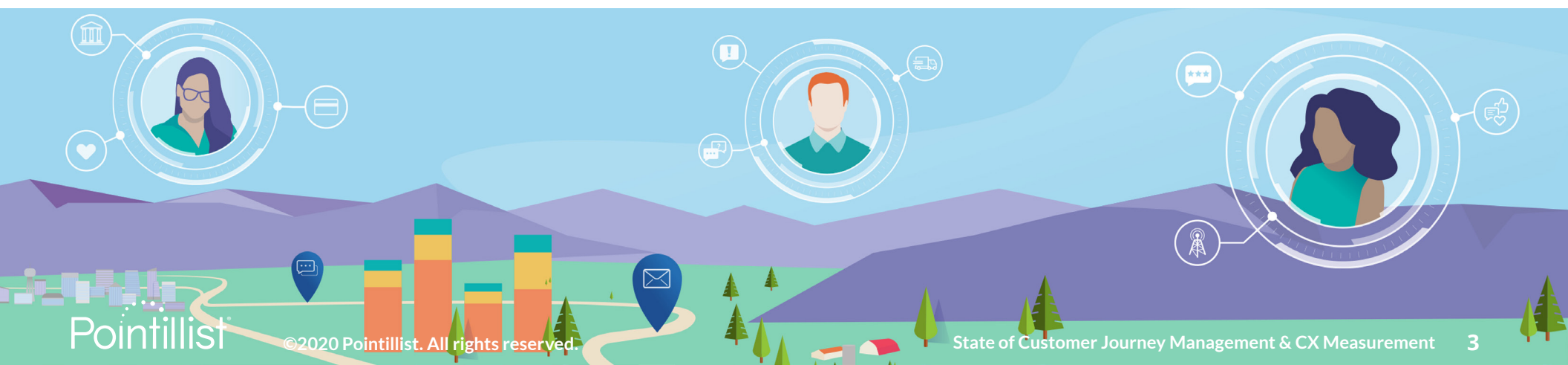
Pointillist surveyed over 1,050 CX, analytics, customer care and marketing professionals from a variety of industries across the world to discover what separates leaders from laggards. In this report, we'll explore key findings and insights on:

- Primary CX management and measurement challenges
- Effective strategies and approaches to measure and improve CX
- Top investment priorities
- Important KPIs and metrics
- Key capabilities and characteristics that separate top performers from their peers



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Executive Summary

Customer experience remains top of mind for enterprises in 2020. CX, analytics, customer care and marketing teams must now mature their customer journey management and measurement approaches to improve experiences and connect customer behavior to business outcomes.



01 Top Performing Organizations Succeed with a Data-Driven, Journey-based Approach to Measure and Improve CX (See page 7)

Virtually all organizations recognize the value of a journey-based approach to customer experience. The most successful are aligning their organizations around customer journeys and are more effective at integrating journey data, analyzing customer behavior and orchestrating actions.

02 An Inability to Quantify ROI is Still the Top CX Challenge and is a Barrier to Additional Investment (See page 14)

CX teams continue to struggle to quantify the ROI of their CX initiatives, making it difficult for them to obtain approval and budget for new CX initiatives. The problem is most acute for the least successful CX teams, who say their CX measurement program is immature or non-existent.

03 Lack of a Centralized Source of Journey Data is the Primary Obstacle for Effective CX Measurement and Personalization (See page 18)

The number one CX measurement challenge continues to be a lack of centralized customer journey data. Data silos limit the ability of the least successful CX teams to understand their customer's overall experience, effectively measure CX and orchestrate personalized experiences.

04 Voice of the Customer (VoC) Data Doesn't Tell the Whole Story (See page 23)

Most enterprises collect customer feedback data, and NPS and CSAT continue to be the most frequently cited metrics used for CX measurement. However, respondents say they are challenged with using feedback data for CX measurement because they can't connect it with cross-channel behavior, it doesn't reflect their customer's overall experience and it is difficult to link it to tangible business outcomes such as revenue, churn and customer lifetime value.

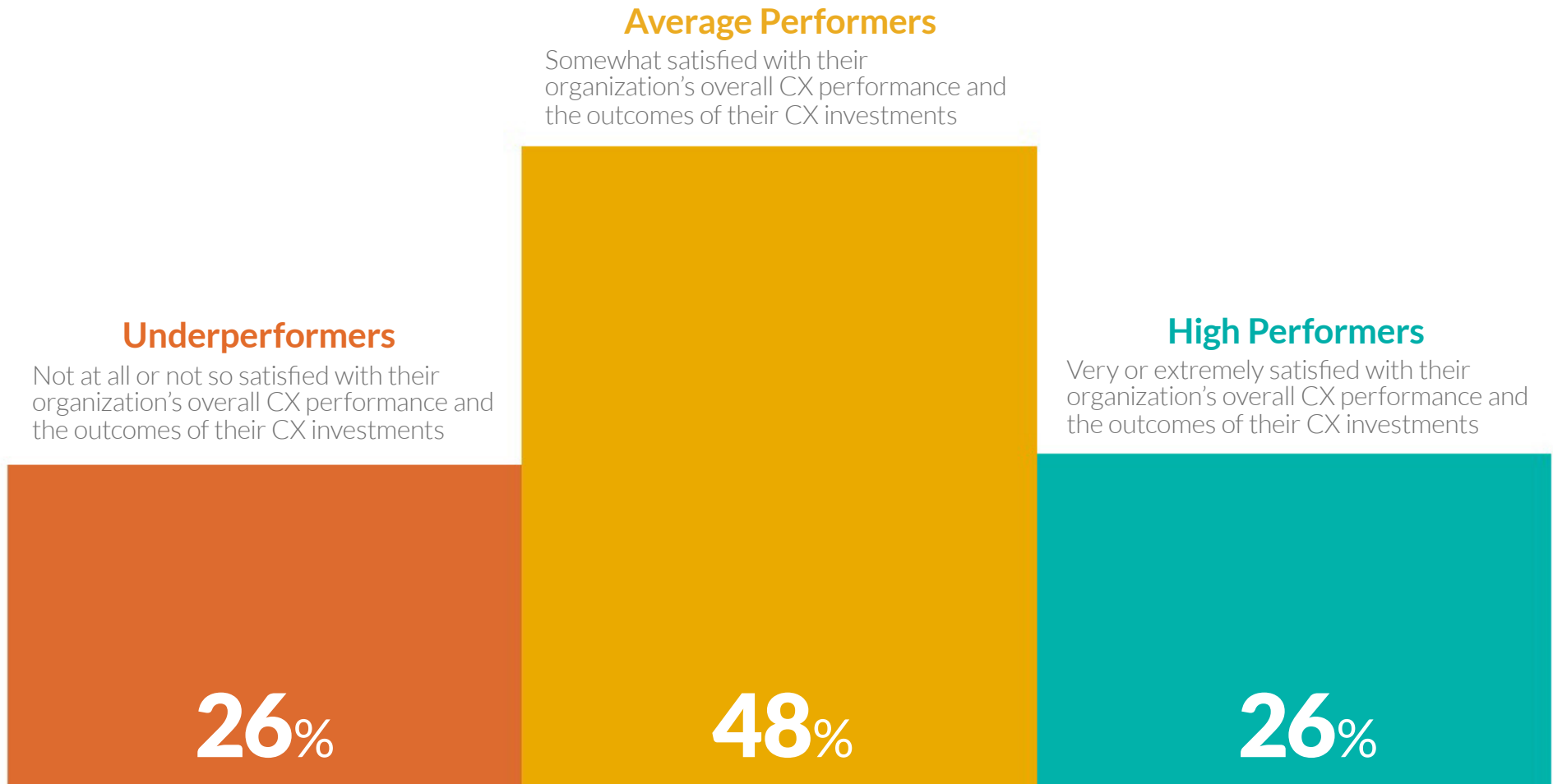
05 High Performers Take a More Sophisticated Approach When Leveraging Technology to Improve CX and Business Results (See page 27)

Organizations continue to mature in their approach to using advanced technologies, such as AI, journey analytics and journey orchestration to manage customer journeys and measure customer experience. For example, while underperformers most frequently use or plan to use AI to support chatbots and generate next-best actions, high performers are focused on using AI for journey-based analyses, such as rapidly detecting CX issues, predicting journey or business outcomes and orchestrating personalized experiences.

Introduction

Breakdown of CX Performance Levels

To identify key factors that separate top performing teams from their peers, this report groups respondents into three segments based upon overall satisfaction with their organization's CX performance.



Introduction: Adoption of a Journey-based Approach is Critical for CX Success

In 2020, there is no debating the importance of customer experience across a wide range of industries. Now, the conversation has shifted; business leaders must find a way to overcome their journey management and CX measurement challenges and deliver exceptional customer experiences.

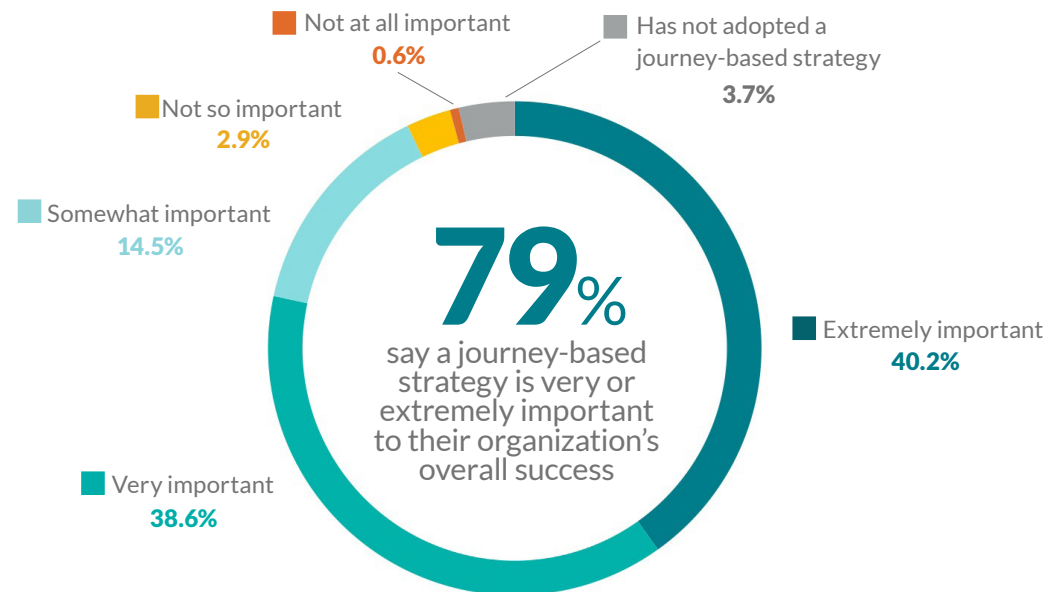
High-performing organizations rely on a journey-based approach to effectively manage and measure CX and maximize business results. In fact, **over 95% of organizations have adopted a journey-based approach to CX and eight-in-ten respondents say a journey-based strategy is critical to the overall success of their business.**

Over 90% of respondents say that a journey-based approach has a positive impact on their ability to identify opportunities to improve CX, align teams on goals and metrics, and understand key journey signals that influence outcomes.

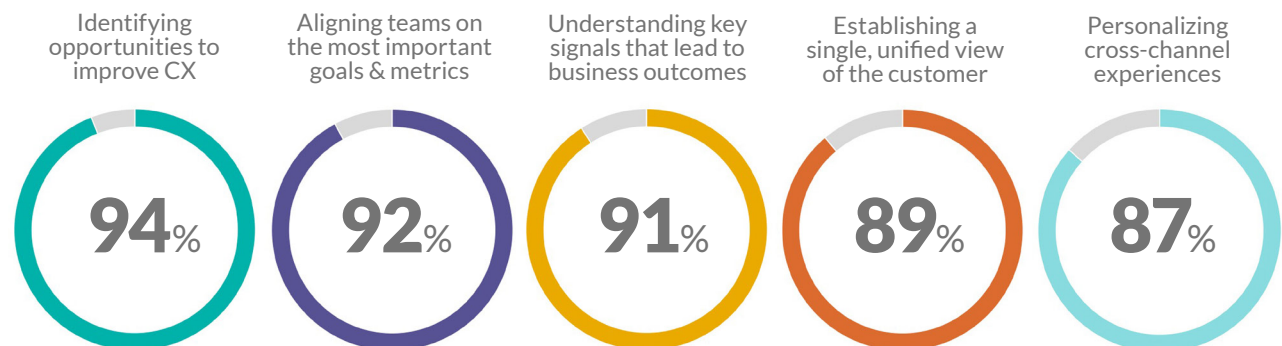
As organizations align their teams around the customer, developing journey-based roles is growing in importance. **Over 50% of companies also have a role or team dedicated to journey management or journey analytics.**

As customer demands and goals evolve rapidly, customer-centric leaders are prioritizing investments in customer analytics and insights to meet their expectations and succeed in a highly competitive environment.

Organizations Recognize the Importance of a Journey-Based Approach



Percentage of Respondents That Agree or Strongly Agree That a Journey-based Approach Has a Positive Impact on the Following:



High Performers Succeed With a Data-Driven, Journey-based Approach to CX

“Successful CX programs require aligning everyone in your organization with your customers’ goals. Ultimately, delivering the experiences your customers demand comes down to monitoring and measuring your customer’s journeys, so you can identify the best opportunities for improvement.”



Jeannie Walters, CCXP
CEO
Experience Investigators by 360Connex

“To achieve your goal, you need to first enable your customers to achieve their own. Customer journeys should be defined by the goal the customer is trying to achieve, so you can shift the focus to how the customer’s life was helped (or hindered) by the experience you delivered.”



Jeanne Bliss, CCXP
Founder and CEO
Customer Bliss



01 High Performers Succeed With a Data-Driven, Journey-based Approach to CX

The majority of organizations have adopted a journey-based approach. High-performing teams are more likely to use this approach than average or underperforming teams and believe it is critical to their overall success.

Many companies are now structuring their organization around customer journeys. **The majority of high performers (70%) have a role or team dedicated to journey management, compared to 31% of underperformers.**

High Performers vs Underperformers

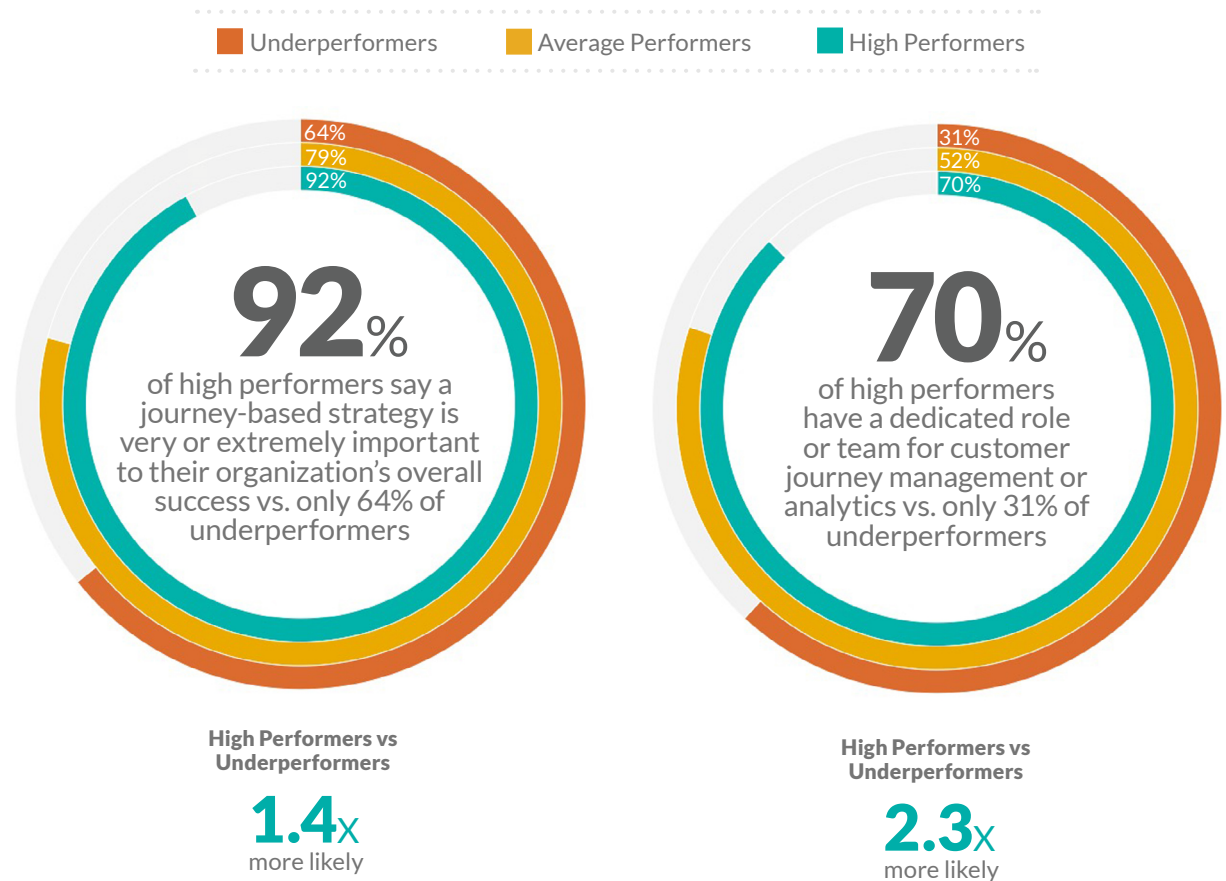
2.3X more likely to have roles or teams dedicated to customer journey management and analytics than underperformers

“Customer-centric enterprises are realizing the value of approaching CX from a journey-based perspective. Industry-leading organizations are now dedicating roles—or even entire teams—to journey management and analytics.”



Kerry Bodine
CEO
Bodine & Company

High Performers are Aligned on a Journey-based Approach to CX



01 High Performers Succeed With a Data-Driven, Journey-based Approach to CX

Leading organizations are leveraging a journey-based approach in a wide variety of ways to better acquire, serve and retain customers. However, high performers adopt a journey-based approach to measure and improve CX and business results more broadly than underperformers.

On average, high-performing teams apply this approach to 6.4 different areas of CX, compared to underperformers who apply this approach 4.6 different ways. Over half of all top performers use a journey-based approach to:

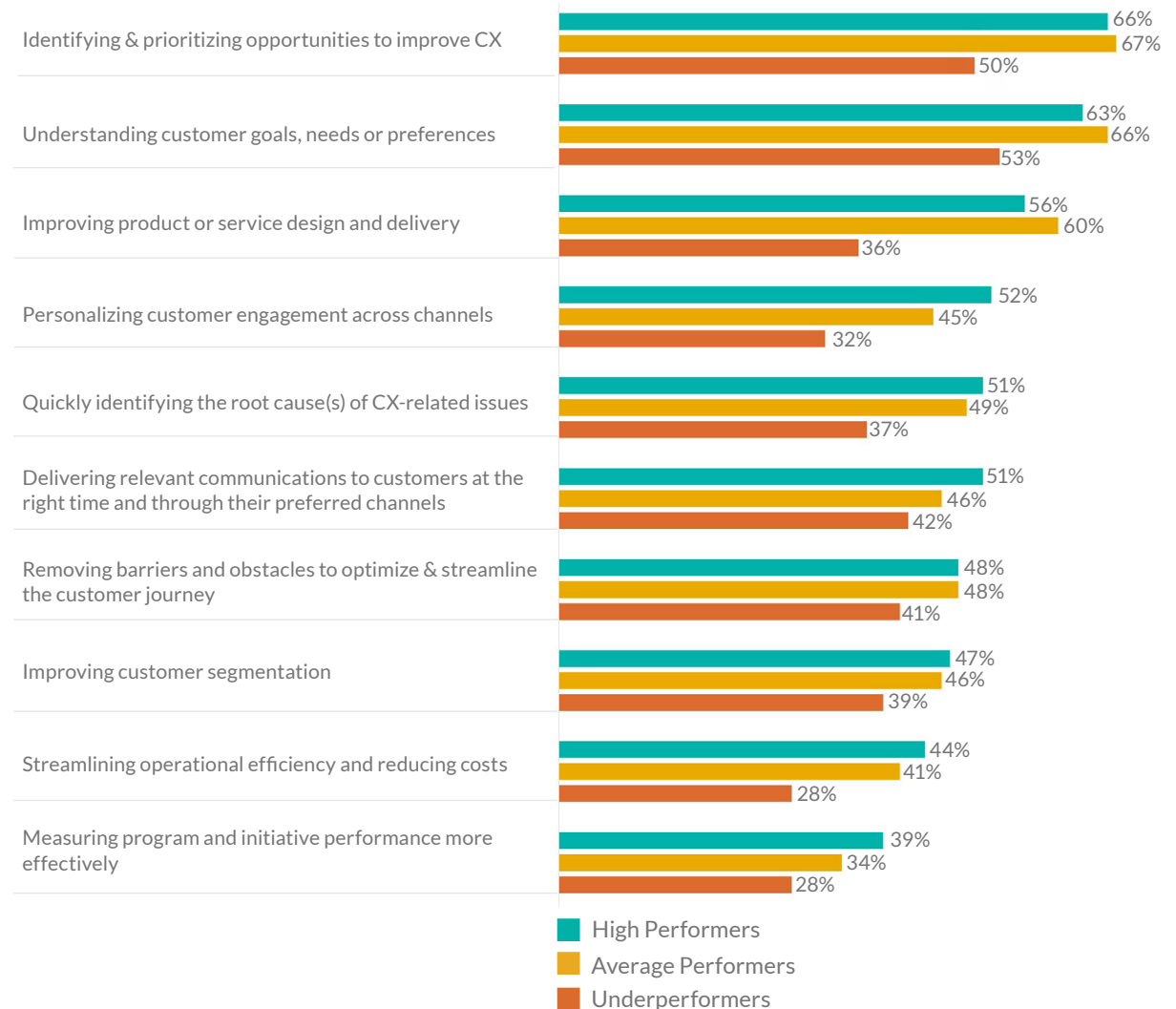
- Identify & prioritize opportunities to improve CX
- Understand customer goals, needs & preferences
- Improve product or service design & delivery
- Personalize cross-channel engagement
- Identify the root cause of CX issues
- Deliver relevant communications at the right time through the preferred channel

Average Number of Ways Respondents Use a Journey-based Approach to Improve CX and Business Results



High Performers Use a Journey-based Approach More Consistently to Improve CX and Business Outcomes

Percentage of Respondents that Use a Journey-based Approach in the Following Ways to Improve CX and Business Results



01 High Performers Succeed With a Data-Driven, Journey-based Approach to CX

Effectively integrating, analyzing and acting on journey data is the foundation of a successful customer experience program. Leveraging a journey-based approach enables high performers to become more effective in three major areas of CX: data integration, journey analysis and orchestration.

High performers are 7.9X more likely than underperformers to be effective at integrating cross-channel data to create a unified customer profile, which fuels their ability to analyze journeys and personalize engagement across channels:

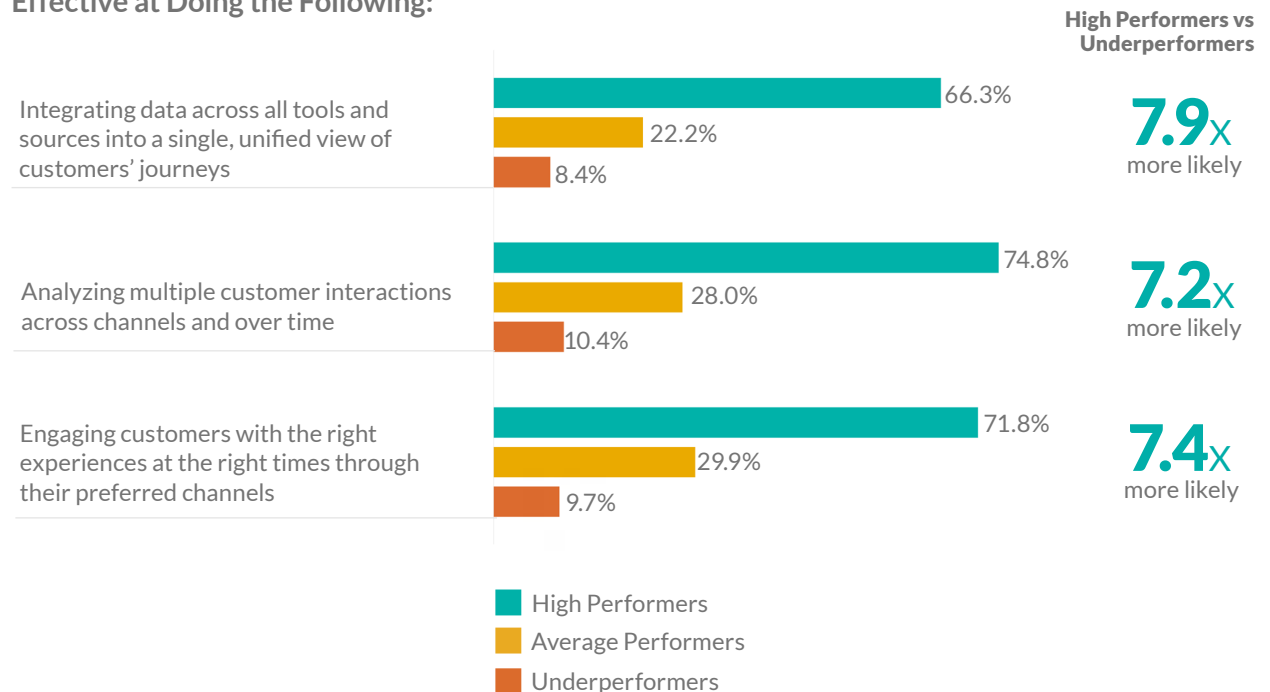
- High performers are 7.2X more likely than underperformers to be effective at analyzing cross-channel interactions
- High performers 7.4X more likely than underperformers to be effective at engaging customers across channels over time

High Performers vs Underperformers

7-8X more likely to be effective at integrating data into a single view of the customer, analyzing customer interactions across channels and engaging customers with personalized cross-channel experiences

High Performers are More Likely to Effectively Integrate Data, Analyze Behavior and Engage Customers Across Channels

Percentage of Respondents Whose Organization is Very or Extremely Effective at Doing the Following:



01 High Performers Succeed With a Data-Driven, Journey-based Approach to CX

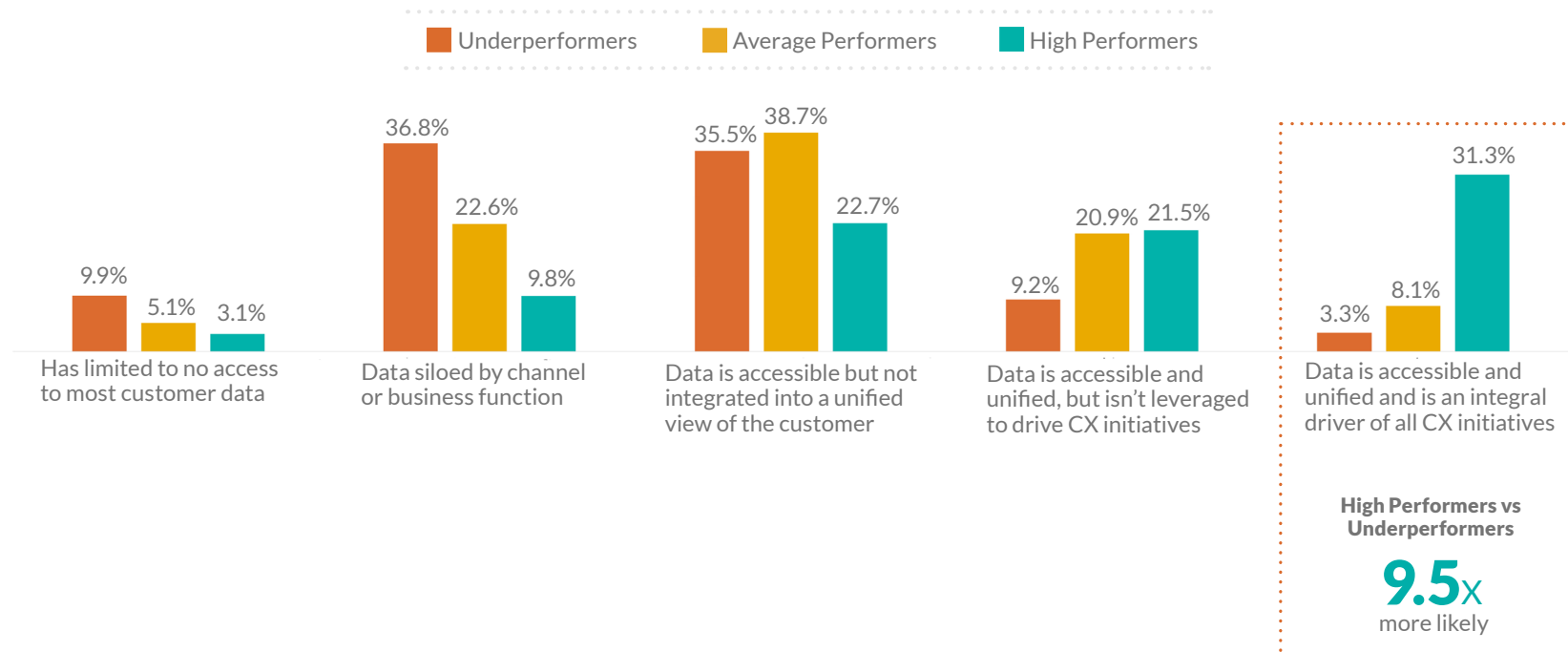
High Performers are More Effective at Managing and Actioning Cross-channel Journey Data

On average, underperformers struggle with siloed data more consistently than high performers. In fact, **underperformers are 3.6X more likely than high performers to lack access to cross-channel journey data.** Data is inaccessible or siloed by business function, which impedes their ability to build a unified customer view.

High performers are more likely to have access to journey data and use it to drive CX programs and initiatives.

Nearly one-in-three high-performing CX organizations say their cross-channel customer data is accessible, integrated into a unified view of the customer and an integral driver of CX programs and initiatives, while only about 3% of underperformers can say the same. They are also 7X likely than underperformers to be very or extremely satisfied with their ability to rapidly generate insights they can act on.

Percentage of Respondents that Describe Their Organization's Current State of Cross-Channel Data in the Following Ways

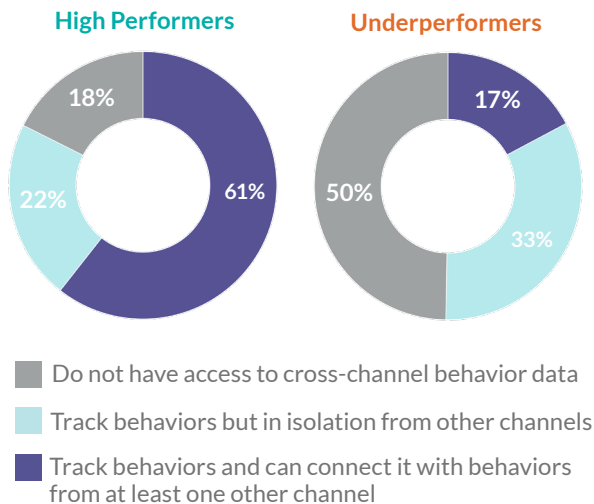


01 High Performers Succeed With a Data-Driven, Journey-based Approach to CX

Almost half (49.7%) of underperformers cannot access data or say that it is siloed within channels.

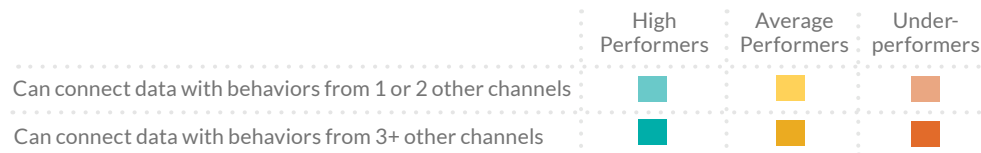
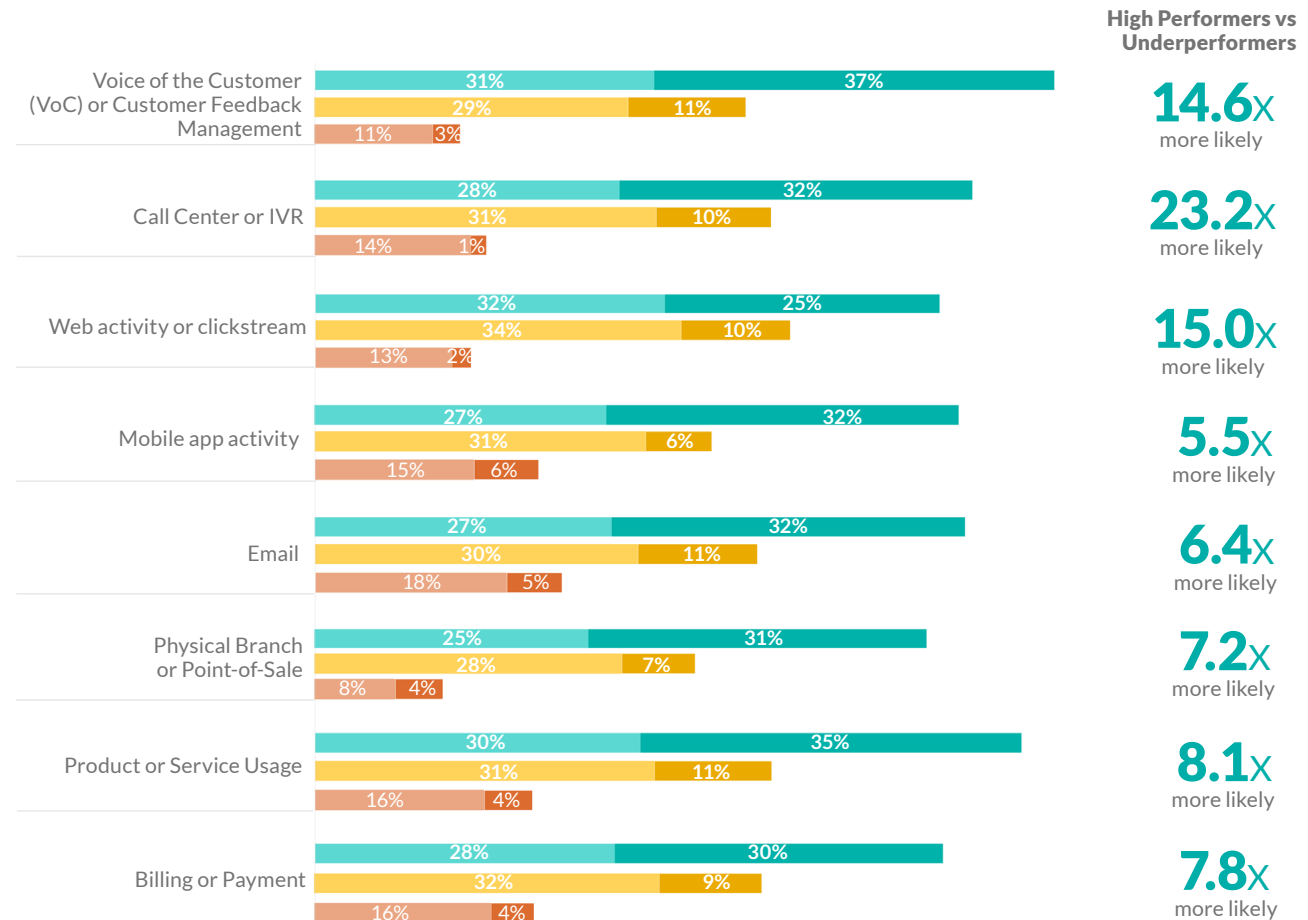
Top performers are much more likely to connect behavioral data across three or more channels. Effective data integration supports their ability to rapidly analyze journey data, generate insights and orchestrate actions to improve customer experiences.

High Performers vs Underperformers



High Performers are More Effective at Connecting Customer Behavior Data Across Channels

Percentage of Respondents Who Are Able to Track Customer Behaviors in The Following Channels and Connect It With Customer Behavior From Other Channels



01 High Performers Succeed With a Data-Driven, Journey-based Approach to CX

High performers tend to take a more mature approach. They are more likely to use a journey-based approach for defining journey-based KPIs and milestones, journey testing and optimization, journey analytics and journey management.

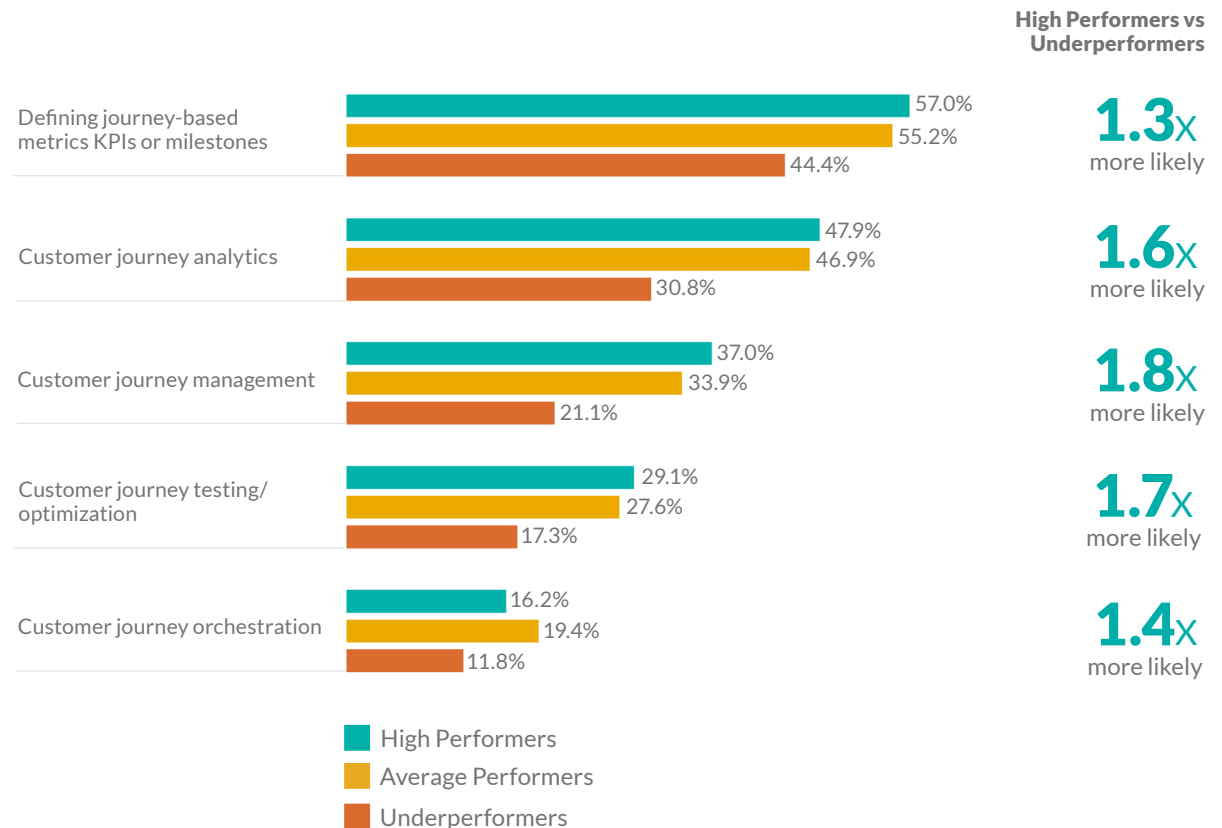
Leveraging these approaches enables organizations to advance their CX measurement programs by improving customer experience in tangible ways.

High Performers vs Underperformers

9.5X more likely to be effective at managing and actioning cross-channel journey-data

High Performers Use a Journey-based Approach for More Advanced Applications

Percentage of Respondents Using the Following Journey-based Methods



An Inability to Quantify ROI is Still the Top CX Challenge and is a Barrier to Additional Investment

“Quantifying the ROI of customer experience is the toughest challenge for CX leaders, but it’s arguably the most important to help brands connect experience to financial results. Not just correlating scores to anticipated revenue but direct cost, revenue and profitability impact. The key is to integrate journey data and make it accessible to the entire organization so each team can assess cross-channel journey performance and determine their impact on business outcomes.”



Diane Magers, CCXP
Founder and Chief Experience Officer
Experience Catalysts

“Measuring and identifying where friction exists along journeys, and what leads to those happy paths where customers easily achieve their goals, is an obsession of customer-centric organizations. A robust journey measurement and analytics program is your path to improving customer experiences and business results, and to enhancing the ability to secure budget for your targeted initiatives.”



Hank Brigman
Customer Experience Strategist
Author of *TOUCHPOINT POWER!*

02 Quantifying CX ROI is Still the Top CX Challenge, Barrier to Additional Investment

For the second consecutive year, quantifying the ROI of customer experience initiatives is the top CX challenge.

Organizations across industries struggle to connect customer behavior and journeys to business-critical KPIs, such as revenue, churn, cost to serve and more. **Only 21% of respondents are very or extremely satisfied with their ability to quantify the impact of CX on business metrics.**

Those who struggle to quantify ROI are much less satisfied with their performance and the outcomes of CX investments.

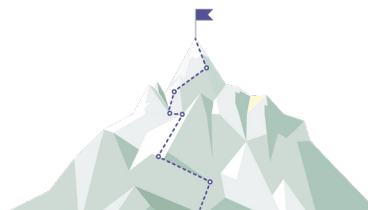
40% of CX leaders agree that quantifying the ROI of customer experience is the #1 overall CX challenge today

49% of enterprise CX leaders are not satisfied with their organization's ability to quantify the impact of CX on hard business metrics

Quantifying Customer Experience ROI Continues to be the #1 Overall CX Challenge

Top CX Challenges Overall 2019

- 1 Quantifying customer experience ROI
- 2 Breaking down organizational data silos
- 3 Identifying and prioritizing high impact opportunities to improve customer experience
- 4 Generating actionable insights quickly
- 5 Delivering personalization at scale



Top CX Challenges Overall 2020

- 1 Quantifying customer experience ROI
- 2 Breaking down organizational data silos
- 3 Generating actionable insights quickly
- 4 Establishing a customer-first culture
- 5 Measuring customer experience



02 Quantifying CX ROI is Still the Top CX Challenge, Barrier to Additional Investment

Less than one-third of CX team leaders report that they obtained an increase in their CX budgets from 2019 to 2020, while nearly half said their budget stayed the same. Over one-in-five saw their budget actually decrease year over year.

The inability to measure the impact of CX on business outcomes impacts an organization's ability to secure CX budget. Organizations that are challenged to quantify the ROI of CX initiatives report stagnant budgets or small decreases. Without those resources, CX leaders cannot invest in the technology necessary to effectively measure and improve customer experience.

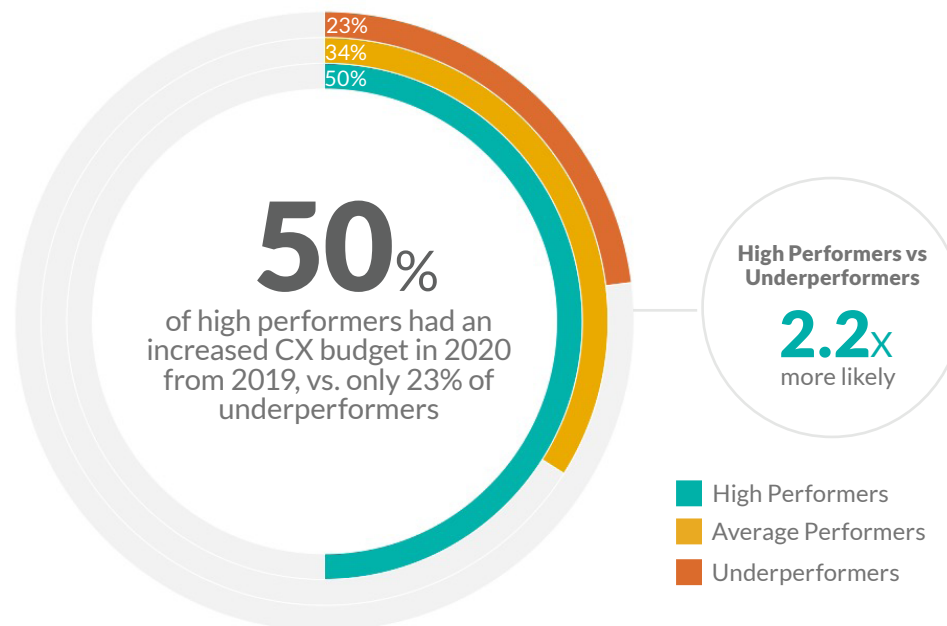
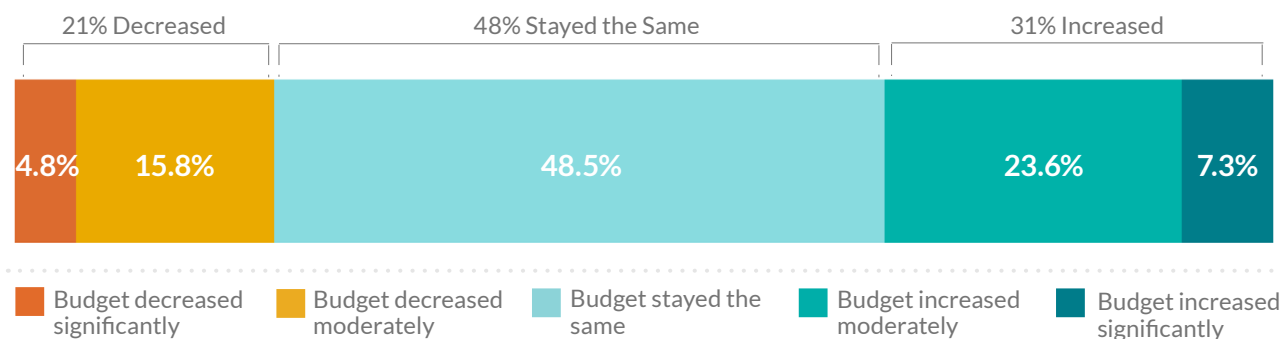
But top performing teams who have more mature CX measurement programs are more likely to quantify the impact of CX on business outcomes, which enables them to obtain budget increases.

High Performers vs Underperformers

6.8X more likely to be very or extremely satisfied with their ability to quantify the impact of CX on hard business metrics

An Inability to Quantify ROI of CX Initiatives Results in Limited Budget

CX Budget Changes 2019 to 2020



02 Quantifying CX ROI is Still the Top CX Challenge, Barrier to Additional Investment

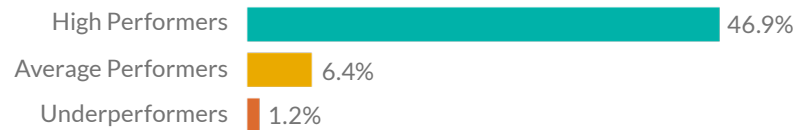
While the majority of CX teams struggle to quantify the impact and ROI of customer experience, high performers have significantly more mature CX measurement programs, and thus are able to do so much more effectively. Almost half (47%) of all high performers say their CX measurement program is very or extremely mature, versus only 6% of average performers and just over 1% of underperformers.

With more advanced measurement programs, **high performers are 7X more likely to be able to generate journey-based insights, 11.2X more likely to take actions to improve CX and 6.8X more likely to quantify results more effectively than underperformers.**

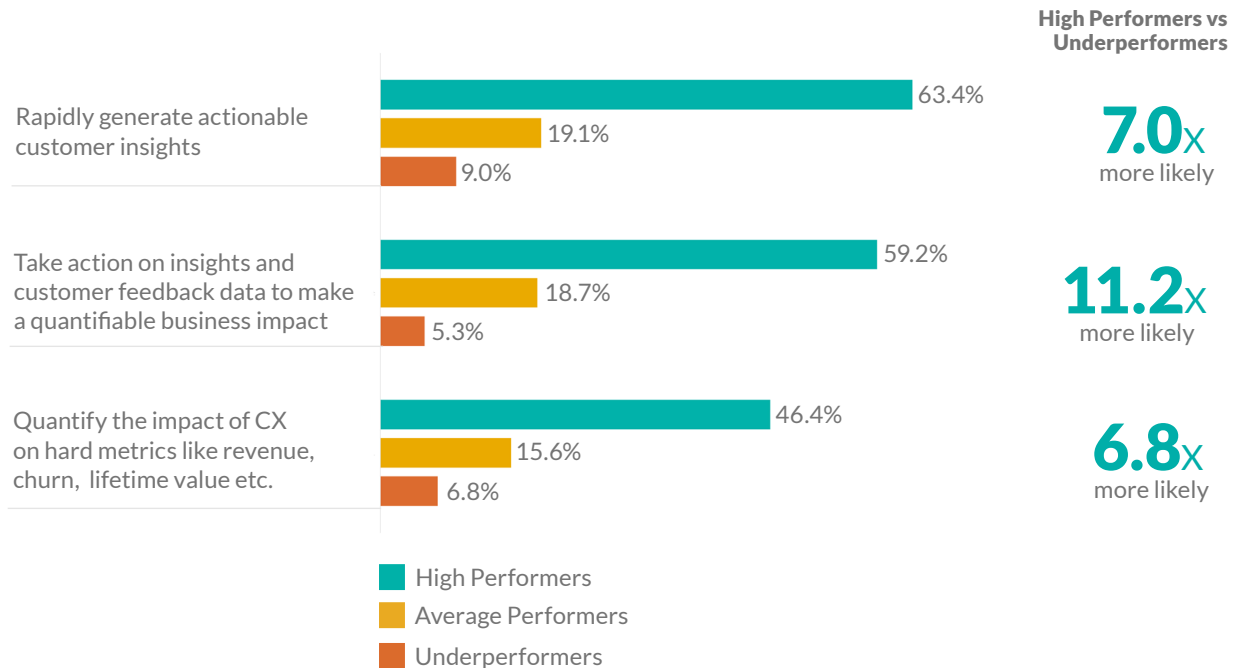
89% of underperformers say their CX measurement program is immature or non-existent

Top-Performing Teams Have More Mature CX Measurement Programs and Are More Effective at Quantifying the Impact of CX

Percentage of Respondents Whose CX Measurement Program is Very or Extremely Mature



Percentage of Respondents Who are Very or Extremely Satisfied With Their Organization's Ability to Do the Following:



Lack of a Centralized Source of Cross-channel Journey Data is the Primary Obstacle for Effective CX Measurement and Personalization

“Customer data integration is incredibly important for all industries, including financial services where average product holding (APH) is a key metric that captures the number of products purchased by a typical customer. Connecting cross-channel behavior and business unit data is crucial to improve APH, achieve cross-sell goals and meet customer needs.”



Jeff Sheehan
Customer Experience Consultant
CX JS Consulting



03 Lack of a Centralized Source of Cross-channel Journey Data is Primary Obstacle

Data silos are the primary barrier for effectively measuring and improving customer experiences. Fragmented journey data impedes an organization's ability to quantify ROI, which is the #1 overall CX challenge.

Siloed data also impacts an organization's ability to analyze cross-channel journeys to generate actionable insights and measure experiences, two of the top five overall CX challenges.

Breaking down organizational data silos is the #2 overall customer experience challenge for the past two years. In addition, lacking a single view of the customer and customer journey is the #1 CX measurement challenge for the second consecutive year.

48% of enterprise CX leaders agree that lacking a single view of the customer and customer journey is the #1 challenge for effectively measuring customer experience

Siloed Data Impedes the Ability to Measure CX and Quantify ROI

Top CX Challenges Overall

- 1 Quantifying customer experience ROI
- 2 Breaking down organizational data silos
- 3 Generating actionable insights quickly
- 4 Establishing a customer-first culture
- 5 Measuring customer experience

Top CX Measurement Challenges

- 1 Lacking a single view of the customer and customer journey
- 2 Generating actionable insights quickly, in real time
- 3 Lacking sufficient internal time or resources
- 4 Lacking access to siloed data across multiple sources
- 5 Lacking the right tools or technology to collect and/or analyze data

03 Lack of a Centralized Source of Cross-channel Journey Data is Primary Obstacle

Lacking a single customer view is the #1 challenge for CX measurement. The majority of respondents struggle to integrate journey data across channels into unified profiles, and even fewer leverage it as integral driver of CX initiatives.

Without a unified and up-to-date view of each customer, organizations struggle to effectively measure customer experience, optimize journeys and deliver personalized experiences.

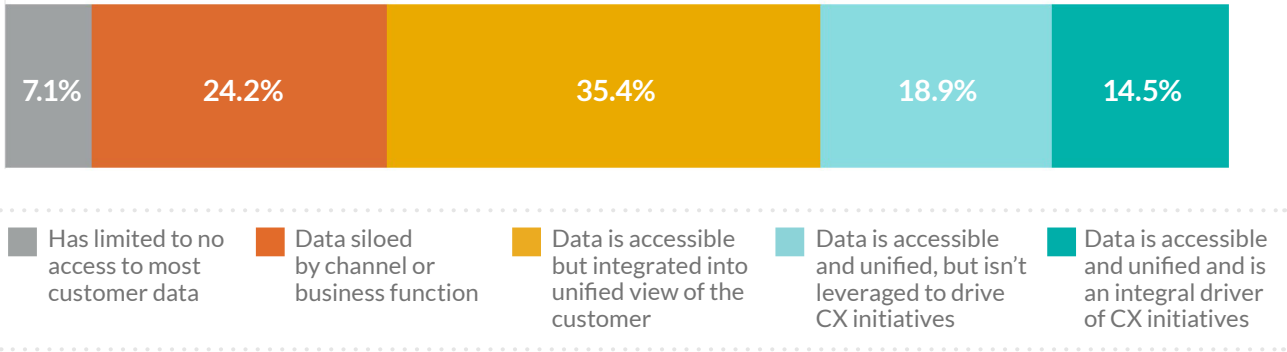
Nearly one-third of CX teams lack any access to cross-channel customer data, while more than two-thirds do not have data integrated into a unified view of their customer.

High Performers vs Underperformers

9.5X more likely to have their cross-channel data accessible, unified into a single view of the customer and leveraged as an integral driver of all CX programs and initiatives

Cross-channel Customer Data is Unified, Fully Accessible and Leveraged to Drive CX Initiatives in Only 14% of Organizations

Percentage of Respondents that Describe the Current State of Their Organization in Terms of Managing and Actioning Cross-channel Data as the Following:



03 Lack of a Centralized Source of Cross-channel Journey Data is Primary Obstacle

Of those who have accessible data and track customer behaviors across 8 of the most common channels, 44% can only track interactions in isolation and are not able to connect them with customer behaviors in other channels. **On average, only 10-15% of organizations can connect customer behaviors from any of the 8 most common sources with behaviors across 3 or more other channels.** In addition, only 19.6% have a centralized and accessible source of customer data that provides unified customer profiles across all sources and channels, which are automatically created and progressively updated.

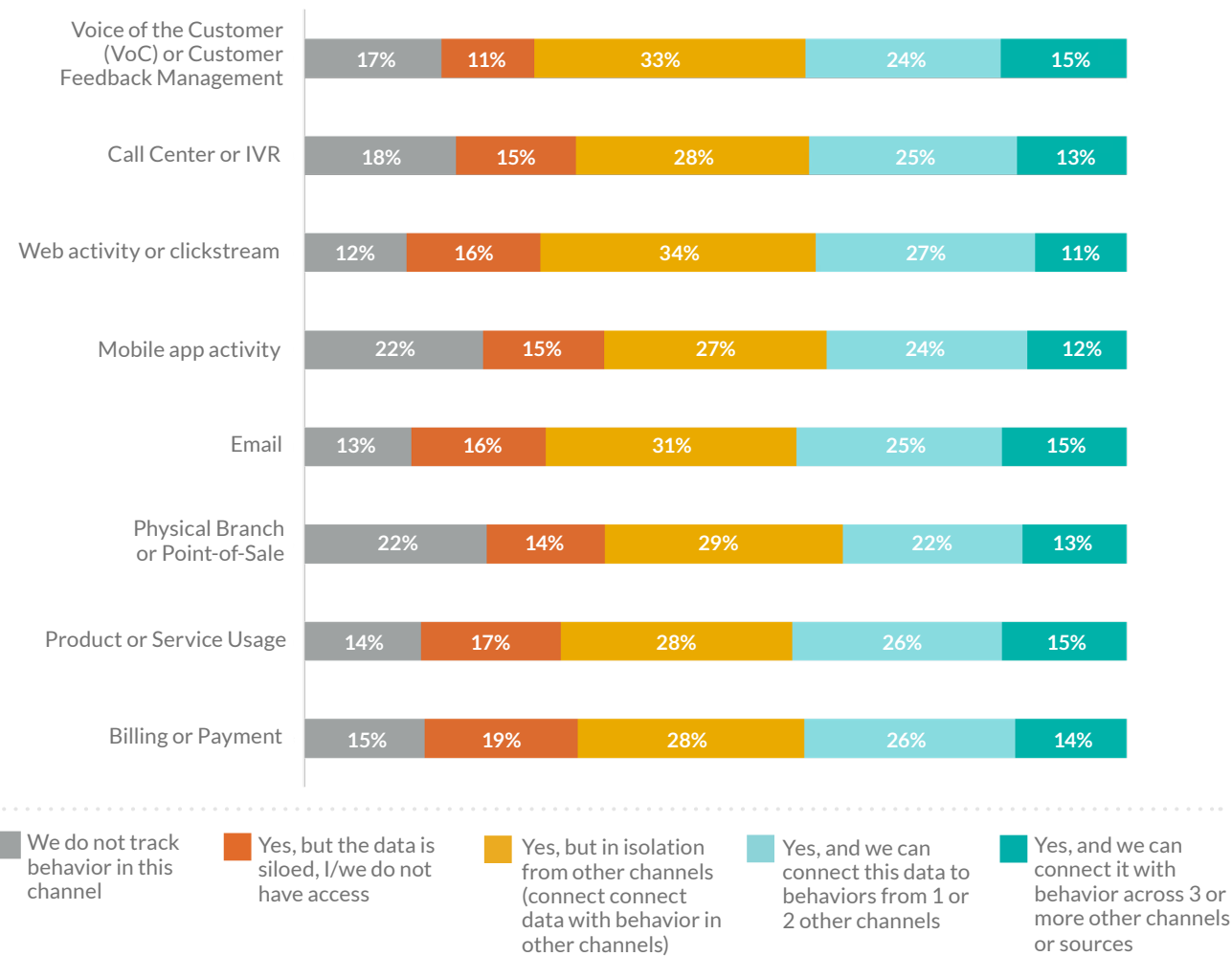
Creating those unified profiles requires two critical capabilities: 1) integrating journey data across all channels and 2) resolving customer identities. **60% of analytics and business intelligence professionals surveyed say that aggregating and preparing cross-channel data for analysis is the #1 top challenge when analyzing customer data sets to generate actionable insights.** Meanwhile, rapidly generating actionable customer insights is the #3 top overall CX challenge, and the #2 challenge for measuring customer experience.

High Performers vs Underperformers

9.7X more likely to be able to connect behavioral data from each channel with customer behaviors across 3 or more other channels

Organizations are Challenged to Connect Behavioral Journey Data Across Multiple Sources

Does your organization track customer behavior across the following channels, and if so, to what extent are you able to connect it with customer behavior from other channels?



03 Lack of a Centralized Source of Cross-channel Journey Data is Primary Obstacle

Of the top five frustrations that organizations believe have the greatest negative impact on CX, three are related to personalization.

But despite the importance of cross-channel personalization, many organizations struggle to do so effectively and at scale. **The #1 and #2 top challenges for delivering personalization are data or organizational silos which results in disjointed messaging and limited personalization using customer data from a small number of channels or sources due to lack of integration across tools and systems.**

Since many organizations lack a single customer view, they personalize interactions based on limited data within siloed touchpoints, rather than a customer's overall experience. This results in inconsistent and disjointed messaging and ultimately, ineffective personalization.

This finding helps explain why only **less than a third of organizations say they are effective at engaging customers with the right experiences at the right times through their preferred channels.**

High Performers vs Underperformers

- ▶ Integrating data across all tools and sources into a single, unified view of customers' journeys **7.9X** more likely
- ▶ Engaging customers with the right experiences at the right times through their preferred channels **7.4X** more likely

Organizations Struggle to Orchestrate Personalized Experiences Due to Data Silos, Which Has the Greatest Negative Impact on CX

Top Customer Frustrations that Have the Greatest Negative Impact on CX

- 1** Lack of personalized experiences
- 2** Employees not understanding customer goals, needs or preferences
- 3** Failure of the organization to recognize and proactively intervene when a customer is unhappy
- 4** Customers not receiving timely and relevant communications
- 5** The organization neglecting to take action on customer feedback
- 6** Lack of effective customer-self help channels or mechanisms
- 7** Long wait or response times

Top Challenges for Delivering Cross-Channel Personalization at Scale

- 1** Data or organizational silos resulting in disjointed messaging
- 2** Limitations due to lack of integration across tools and systems
- 3** Lack of internal time and/or resources
- 4** Difficulty prioritizing which experiences to personalize first over others and for which customers
- 5** Personalization limited to demographic and/or firmographic traits, not based on each customer's individual behavior
- 6** It's too complex to centrally manage workflow rules for all the applications that customers interface with
- 7** Lack of sufficient tools or technology

Voice of the Customer (VoC) Data Doesn't Tell the Whole Story

“Surveys capture lagging indicators of a customer's experience, which are important gauges of success, but they're not actionable. Root cause analyses can zero-in on where teams should focus, so that progress at the team level will naturally yield corresponding progress in big-picture metrics like wallet share, market share, revenue growth and earnings growth.”

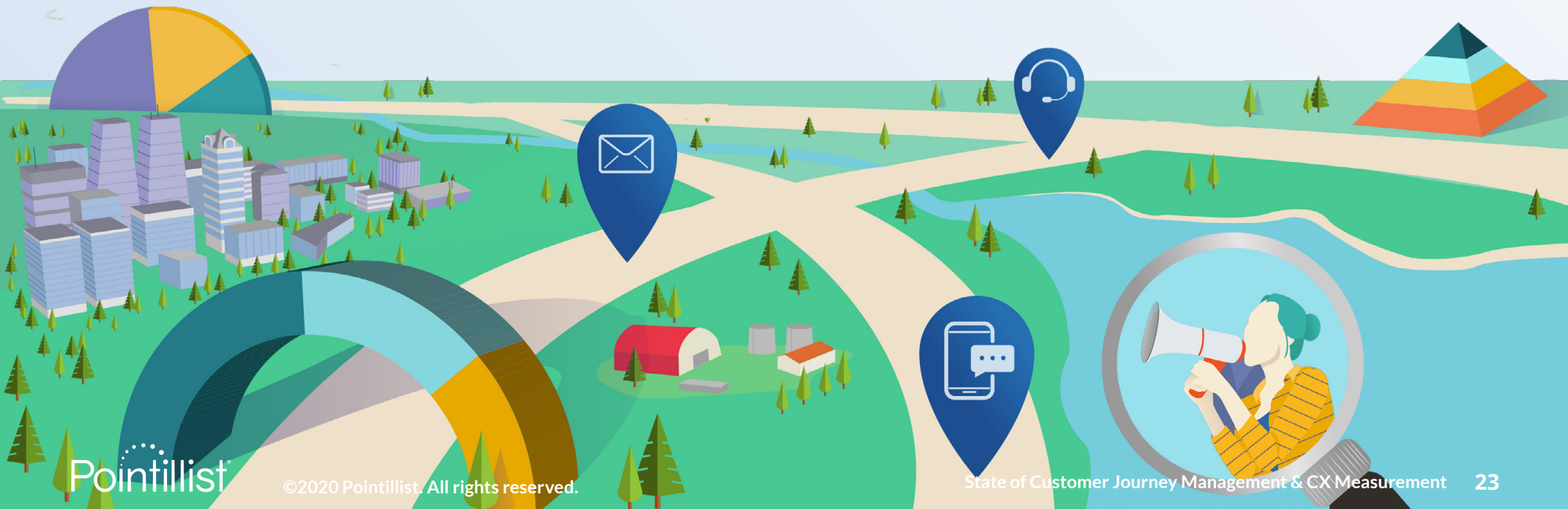


Lynn Hunsaker, CCXP, PCM
Chief Customer Officer
ClearAction Continuum

“Truly customer-centric organizations understand the importance of capturing, listening to, and acting on customer feedback to inform the continuous improvement of the customer journey. Recognizing that the customer journey must be managed, not just mapped, mature organizations use VoC, VoE (employee) and VoP (process) data as one part of a series of interconnected activities to continually deliver tangible and measurable CX improvement.”



Ian Golding, CCXP
CEO and Founder
Customer Experience Consultancy Ltd.

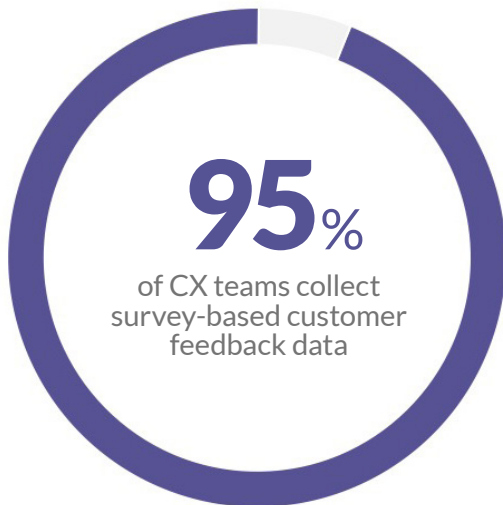


04 Voice of the Customer (VoC) Data Doesn't Tell the Whole Story

The majority of CX organizations (95%) collect customer feedback data. For customer experience professionals, three of the top five high-priority KPIs are NPS® (62.7%), CSAT (54.2%) and CES (30.9%).

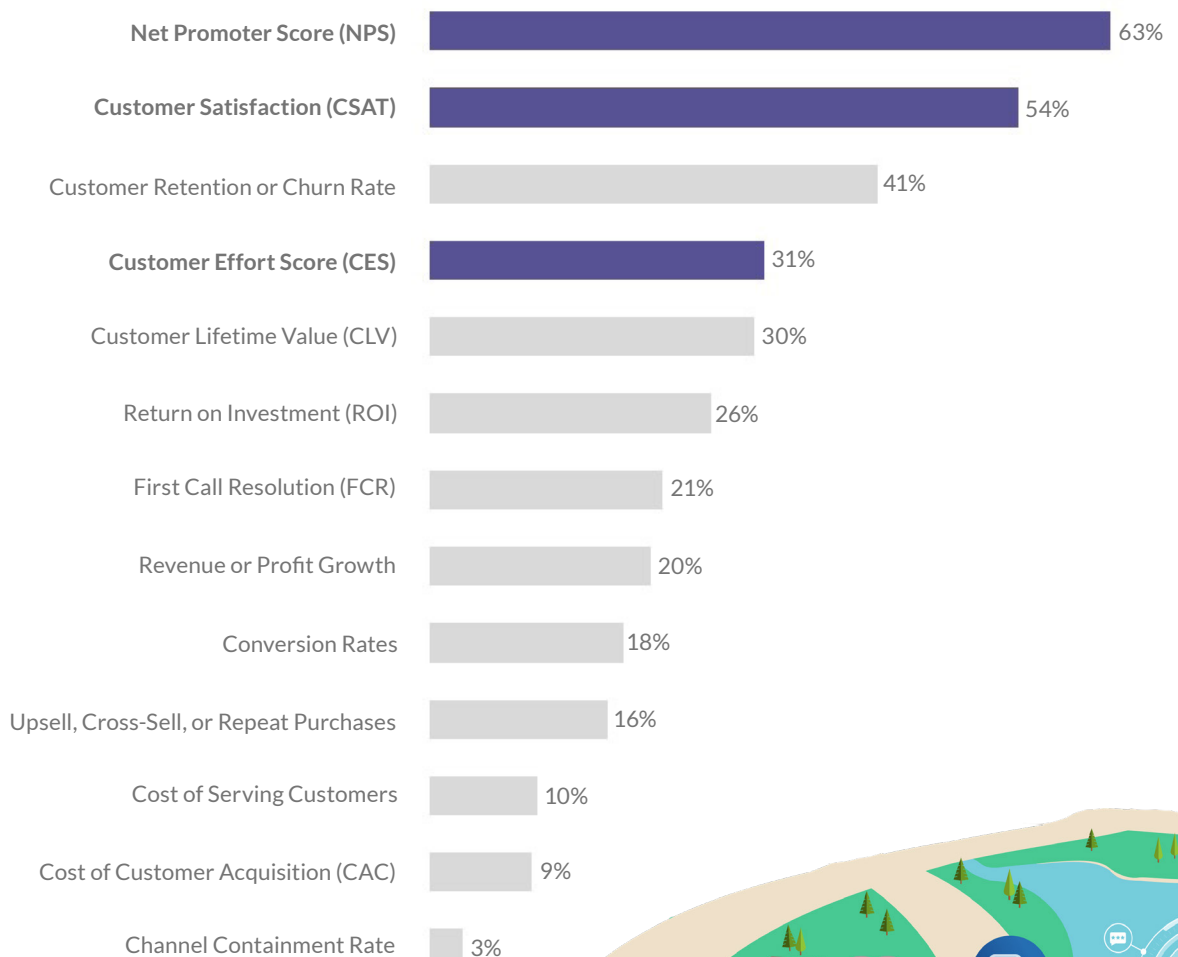
Across industries, company sizes and job functions, NPS is the number one overall high-priority metric, followed closely by CSAT.

And while these metrics are widely used, organizations are challenged to connect feedback to outcomes and use the data to take action and improve experiences.



NPS, CSAT and CES are the Most Frequently Captured Customer Experience Metrics

Top High Priority Metrics & KPIs for CX Professionals



04 Voice of the Customer (VoC) Data Doesn't Tell the Whole Story

Despite their widespread use and importance, CX professionals cite several challenges related to customer feedback metrics that suggest that relying on VoC data alone is not sufficient for effectively measuring customer experience.

The #1 challenge with VoC data is connecting customer feedback to outcomes such as churn, lifetime value and revenue. While most CX pros rely on VoC data to measure interactions, they are challenged to take actions that measurably improve customer experiences. **The second top challenge is that it is much easier to collect customer feedback data than it is to actually operationalize and act on it.** Additionally, CX leaders say that VoC data is a good representation of an interaction within an isolated channel or touchpoint, but it does not reflect a customer's overall experience.

CX pros also say that only a small number of customers participate and that participation rates have declined or become stagnant over time. This hinders an organization's ability to gauge satisfaction and predict outcomes for the majority of customers that do not participate.

60% of enterprise CX leaders agree that the #1 challenge with VoC or other customer feedback data is that it is difficult to link it to tangible business outcomes or results

CX Leaders Recognize Shortcomings of Customer Feedback and Voice of the Customer (VoC) Data

Top Challenges Related to VoC or Other Survey-based Customer Feedback Data

- 1 Feedback data is important, but it is difficult to link it to tangible business outcomes or results (e.g. revenue, retention/churn, lifetime value, etc.)
- 2 It is much easier to collect customer feedback data than it is to actually operationalize and act upon it to make an impact
- 3 Feedback data is often a good representation of a customer's experience related to a single, isolated channel or touchpoint, but is not necessarily reflective of the overall customer experience or journey
- 4 Only a relatively small percentage of customers participate, so it is difficult to predict outcomes or gauge satisfaction for customers that do not participate
- 5 It is difficult to pinpoint which experiences or interactions had the greatest impact on positive or negative feedback responses
- 6 Customer participation rates in feedback surveys have declined or become stagnant over time

04 Voice of the Customer (VoC) Data Doesn't Tell the Whole Story

CX professionals say that a failure of the organization to recognize and proactively intervene when a customer is unhappy and neglecting to take action on customer feedback are both among the top 5 customer frustrations that have the greatest negative impact on customer experience.

Due to siloed data, most organizations are challenged to connect VoC data to business results like lifetime value, churn and more.

Almost 43% of CX leaders are not satisfied with their ability to quantify the impact of customer experience on KPIs and metrics.

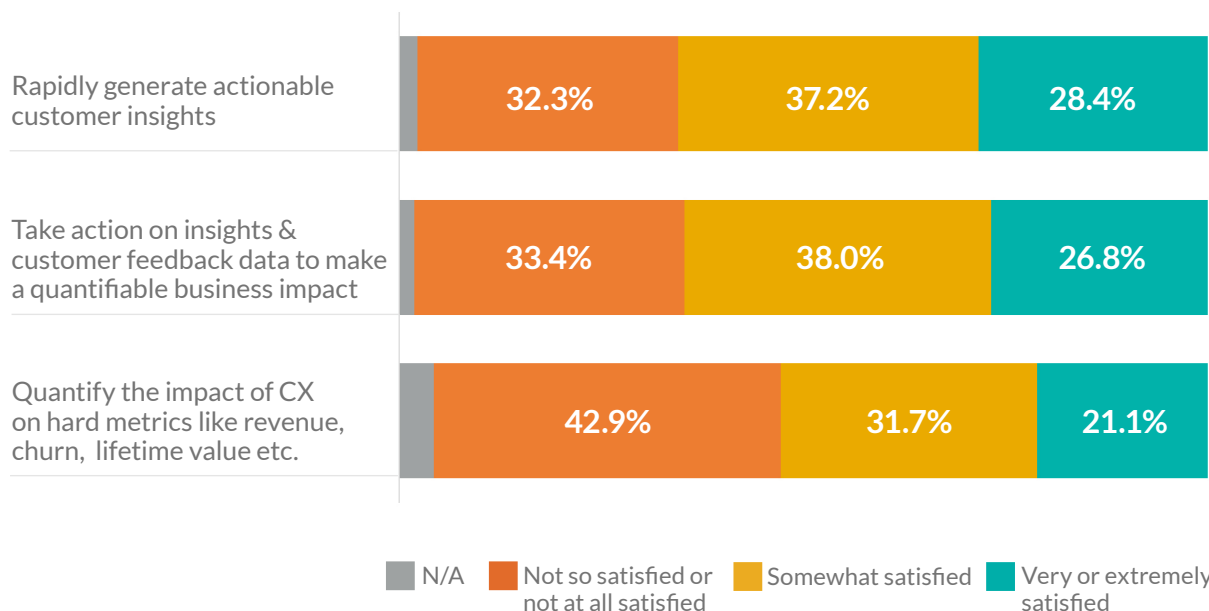
Disparate data also makes it difficult to identify the journeys that lead to specific customer feedback. CX teams are challenged to determine the root cause of the VoC data, which prevents them from generating actionable insights and orchestrating actions to improve experiences.

High Performers vs Underperformers

11.2X more likely to be very or extremely satisfied with their organization's ability to take action on insights or customer feedback data to make a quantifiable business impact

Organizations Struggle to Use Customer Feedback and VoC Data to Quantify and Improve CX

Respondents' Satisfaction Levels with Their Organization's Ability To Do the Following:



"Leading organizations are connecting feedback data to KPIs more effectively by focusing less on specific interactions and more on the journeys that led customers to give feedback. More mature organizations use VoC data in conjunction with other analytics solutions that allow them to link behavior to metrics and quantify the impact of CX initiatives."



Annette Franz
CCXP and CXPA Board Chair
Founder and CEO
CX Journey Inc

High Performers Take a More Sophisticated Approach When Leveraging Technology to Improve CX and Business Results

“The adoption of AI and machine learning has exploded over the years, but their application for understanding and improving customer experience is just beginning to produce value. Early adopters are enhancing customer engagement, uncovering CX issues, and building informative predictive and prescriptive models of customer behavior and business outcomes.”



Kirk Borne
Executive Advisor, Data Science Fellow
Booz Allen Hamilton

“Customer insights are a competitive advantage, but enterprises must invest in dynamic journey maps to deliver the experiences customers expect. The winners will be those who invest in solutions that enable organizations to analyze customer journeys across channels and time and connect them to outcomes like churn, lifetime value and revenue.”



Dan Gingiss
Chief Experience Officer
The Experience Maker, LLC

05 High Performers Leverage More Advanced Technology to Improve CX

Across performance levels, the top investment priorities are dedicated to addressing the challenges of data integration and insight generation, and supporting a journey-based approach to improve journey management and CX measurement. High-performing teams leverage more sophisticated technology, such as customer journey analytics and artificial intelligence (AI), to advance their ability to manage, measure and improve CX.

While customer analytics/insights and digital transformation are top investment priorities across the board, **less mature teams are investing in more traditional practices like journey mapping and data management, while top performers prioritize more advanced solutions such as customer journey analytics, artificial intelligence and machine learning.**

The survey findings also suggest a growing maturity in the market overall, with as many organizations investing in customer journey analytics in 2020 (27%) as journey mapping (25%) and Voice of the Customer (25%).

High Performers vs Underperformers

1.4X more likely to prioritize customer journey analytics as a top CX investment in the next 12 months

High Performers are More Mature in Their Investment in and Use of Technologies Like AI and Customer Journey Analytics

Top CX-Related Investment Priorities in the Next 12 Months by Performance Level

Underperformers

- 1 Customer analytics or insights
- 2 Digital transformation
- 3 Customer data management
- 4 Customer journey mapping
- 5 Voice of the Customer (VoC)
- 6 Customer journey analytics
- 7 Customer journey management
- 8 Omnichannel personalization or orchestration
- 9 Artificial intelligence or machine learning
- 10 Employee experience

Average Performers

- 1 Customer analytics or insights
- 2 Digital transformation
- 3 Customer data management
- 4 Customer journey analytics
- 5 Omnichannel personalization or orchestration
- 6 Voice of the Customer (VoC)
- 7 Customer journey mapping
- 8 Customer journey management
- 9 Artificial intelligence or machine learning
- 10 Employee experience

High Performers

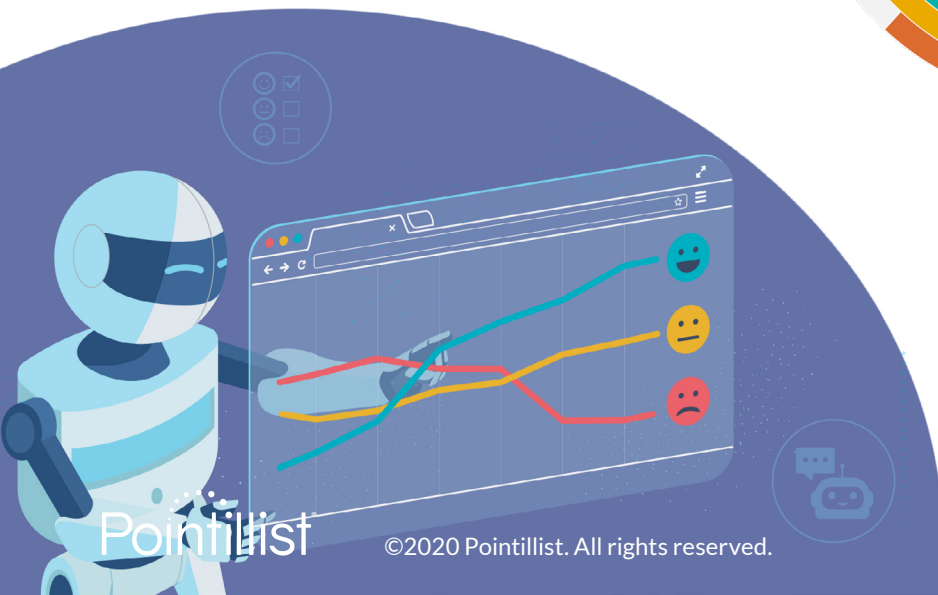
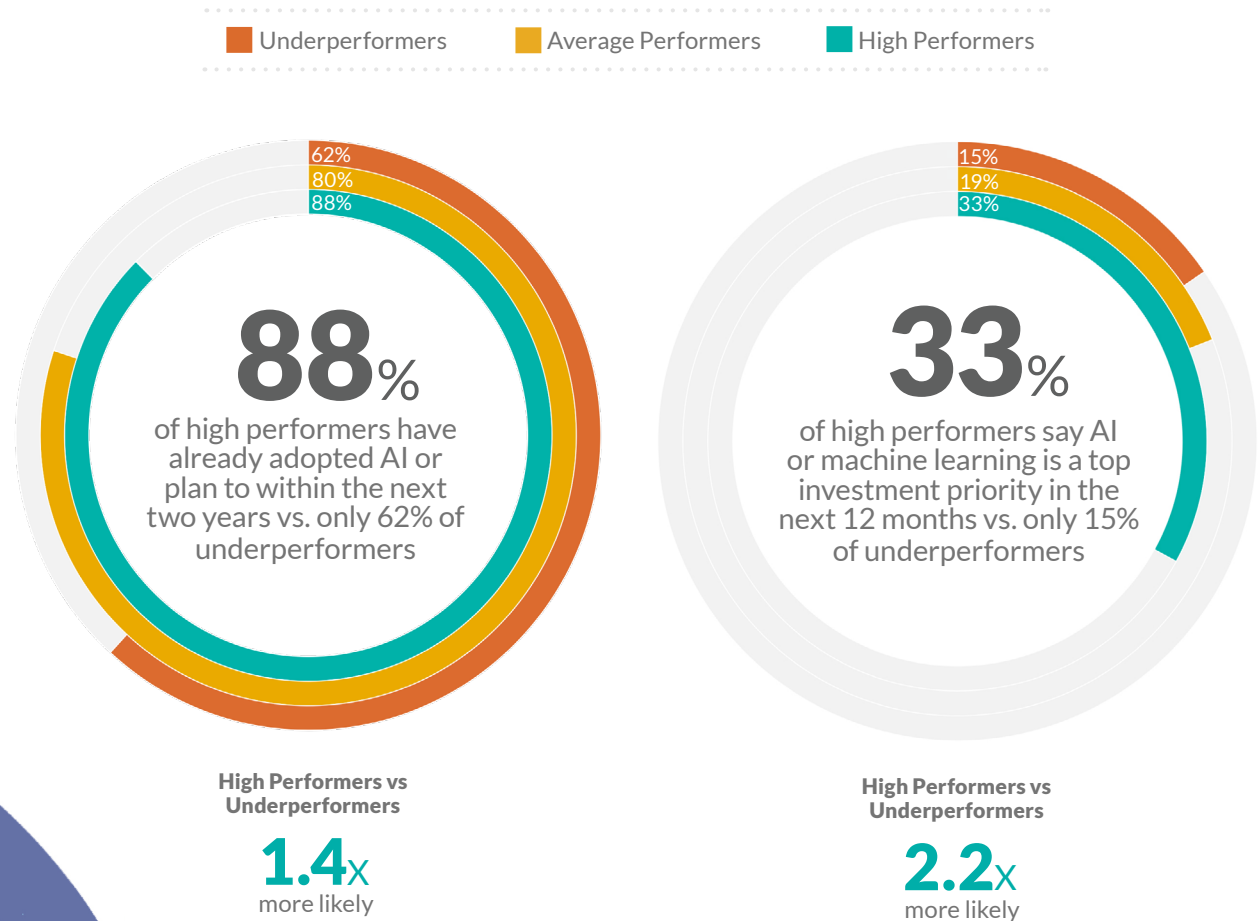
- 1 Customer analytics or insights
- 2 Customer journey analytics
- 3 Digital transformation
- 4 Artificial intelligence or machine learning
- 5 Voice of the Customer (VoC)
- 6 Customer data management
- 7 Customer journey mapping
- 8 Omnichannel personalization or orchestration
- 9 Customer journey management
- 10 Employee experience

05 High Performers Leverage More Advanced Technology to Improve CX

High performers are 1.4X more likely to be leveraging AI, as 88% of top performers have either already adopted AI or plan to within the next two years, versus only 62% of underperformers.

Of those that have not yet adopted AI, one-third of high performers say that AI or machine learning is one of their top three CX-related investment priorities in the next 12 months, versus only 15% of underperformers.

High Performers are More Likely to Adopt Artificial Intelligence (AI)



05 High Performers Leverage More Advanced Technology to Improve CX

And when it comes to leveraging AI, high performers are also more mature in their applications.

While more advanced use cases such as detecting potential CX issues faster, predicting journey or business outcomes and delivering personalized cross-channel experiences are among the top applications of AI for high performers, underperformers are leveraging AI for more basic applications such as chatbots and generating next-best actions.

Using AI for more advanced, journey-based methods helps high performers succeed and enhances their ability to measure customer journeys and orchestrate exceptional experiences.

High Performers vs Underperformers

3.7X more likely to be using AI to detect potential CX issues faster

High Performers Use AI for More Advanced Applications

Top Ways Organizations Use or Plan to Use AI to Improve CX and Business Results



Appendix



Appendix

Percentage of Respondents that Use a Journey-based Approach in the Following Ways to Improve CX and Business Results

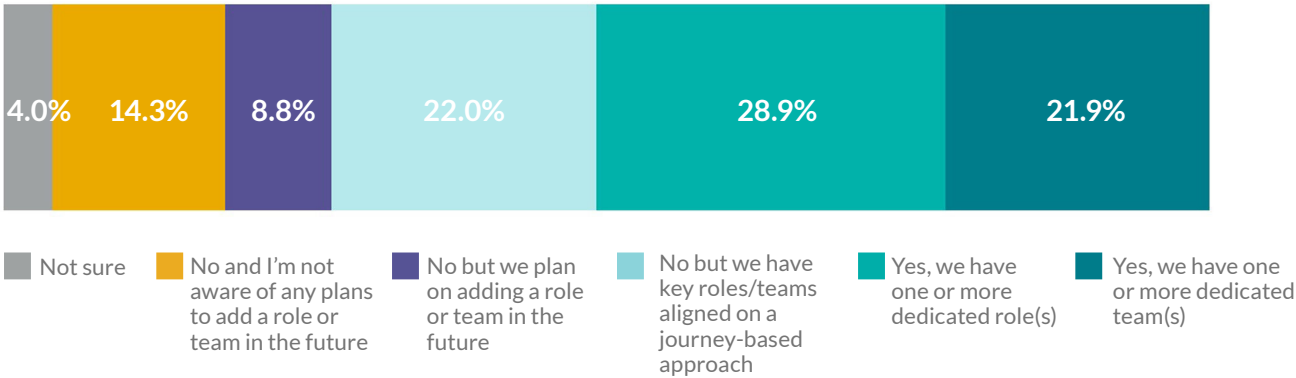
Which of the following ways does your organization use a journey-based approach to improve customer experience or business results? (Please select all that apply)

High Performers vs Underperformers



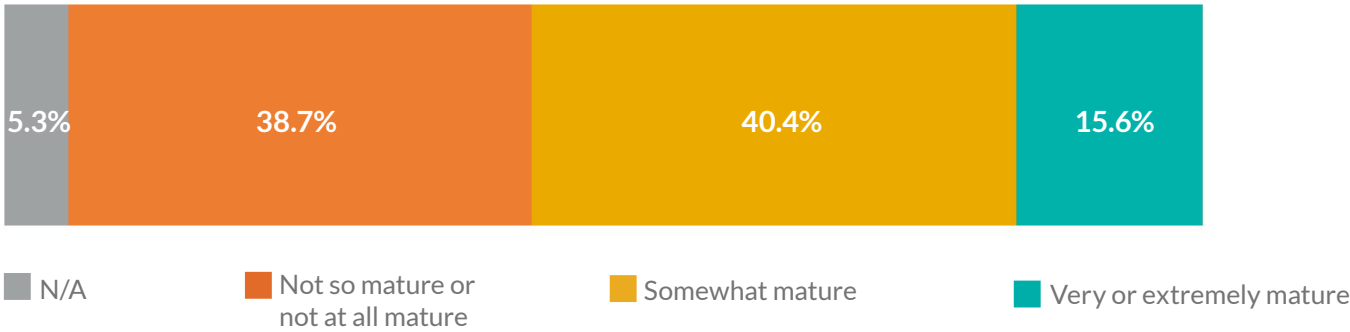
Percentage of Respondents with Journey-based Roles and Teams Overall

Does your organization have a dedicated role or team dedicated to customer journey management and/or journey analytics?



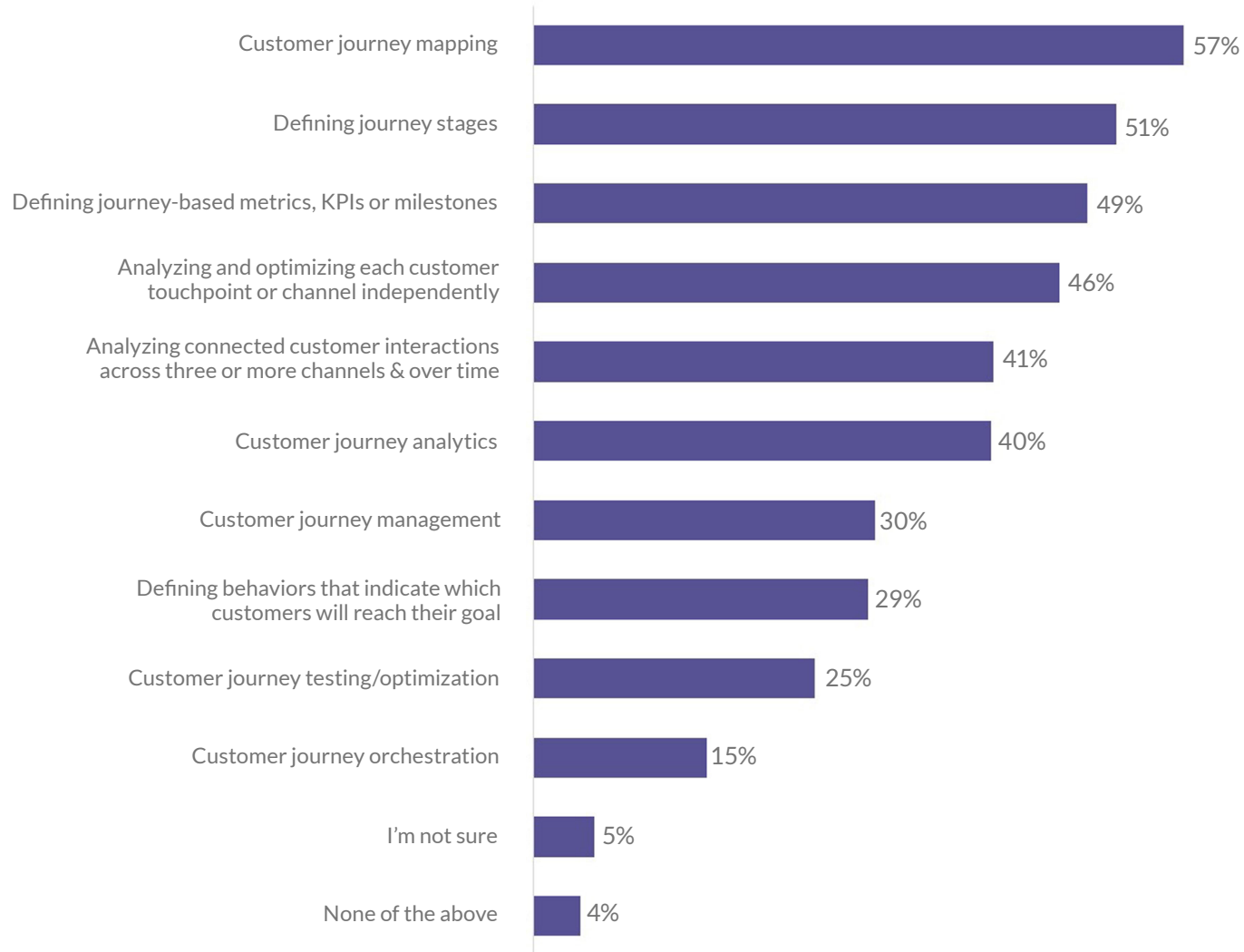
CX Measurement Maturity Levels Overall

How would you rank the maturity level of your organization's CX measurement program?



Top Journey-based Methods and Approaches Overall

Which of the following methods/approaches is your organization using for understanding and optimizing customer journeys? (Please select all that apply)



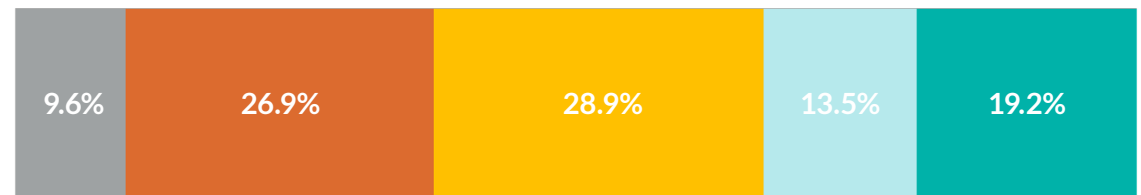
Top Challenges When Analyzing Customer Data Sets to Generate Actionable Insights

**Question Asked Only to Analytics and Business Intelligence Respondents*

- 1 Aggregating and preparing data for analysis
- 2 Determining the correct question to ask of the data
- 3 The amount of time and coding necessary to redefine queries when internal requests evolve
- 4 Anticipating the types and complexity of future analysis requests
- 5 Identifying data sources based on the information requested
- 6 Spending too much time performing descriptive or diagnostic analytics (unable to prioritize predictive or prescriptive)

Current State of Organizations in Terms of Effectively Resolving Customer Identities Across 3 or More Channels

**Question Asked Only to Analytics & Business Intelligence Respondents*



■ We are unable to resolve cross-channel customer identities

■ We need to manually join customer identifiers when we perform ad-hoc analyses across three or more data sources or channels

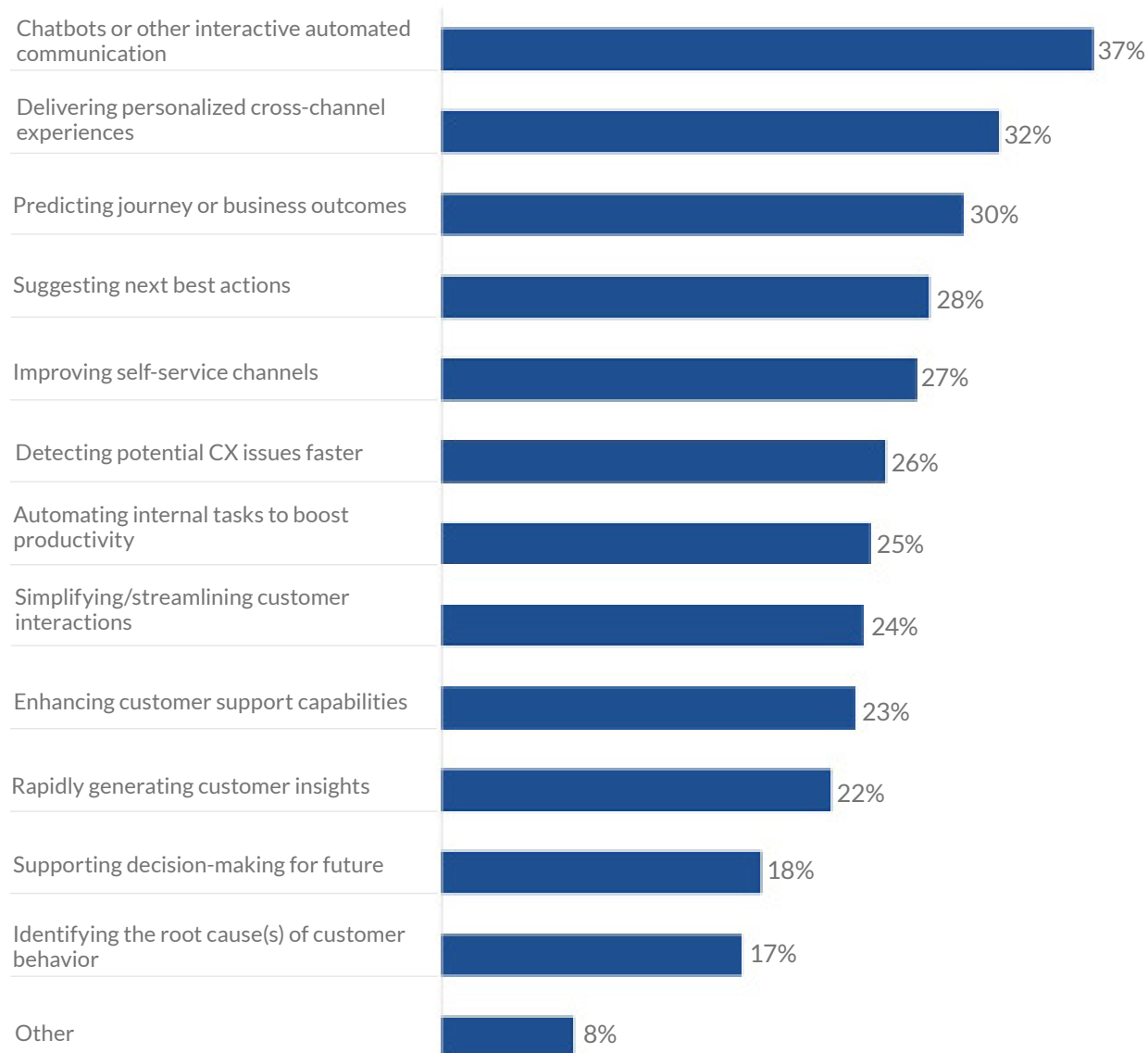
■ We have some, but NOT all, of our customer data joined across three or more sources or channels (e.g. in a data mart, warehouse or lake)

■ We have a centralized and accessible source of customer data, which has been configured to join customer data across three or more sources or channels

■ We have a centralized and accessible source of customer data that provides unified customer profiles across all sources and channels, which are automatically created and progressively updated

Top Ways Organizations Use Artificial Intelligence (AI) or Plan to Use AI in the Next Two Years

Which of the following ways is your organization currently using artificial intelligence (AI) or planning to use AI in the next two years? (Please select all that apply)



Survey Demographics & Firmographics

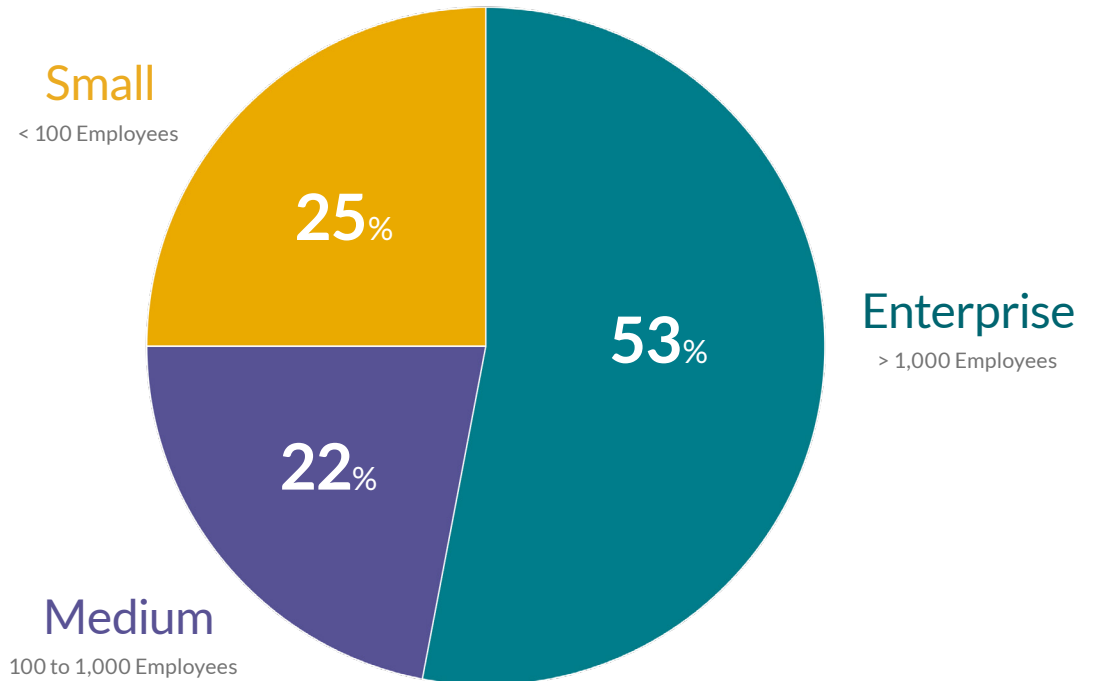


Survey Demographics & Firmographics

INDUSTRY

Financial Services.....	20.1%
Technology & Software.....	16.7%
Consulting.....	11.7%
Telecommunications.....	10.0%
Advertising & Digital Agencies.....	4.7%
Manufacturing.....	3.8%
Retail & Ecommerce.....	6.6%
Education.....	3.5%
Healthcare.....	3.4%
Government.....	2.2%
Transportation.....	2.2%
Hospitality.....	1.8%
Media & Entertainment.....	1.8%
Real Estate & Construction.....	1.5%
Consumer Packed Goods.....	1.4%
Energy.....	1.1%
Non-Profit.....	1.1%
Biotechnology & Pharmaceutical.....	1.0%
Agriculture.....	0.7%
Food & Beverage.....	0.4%
Other.....	7.4%

NUMBER OF EMPLOYEES

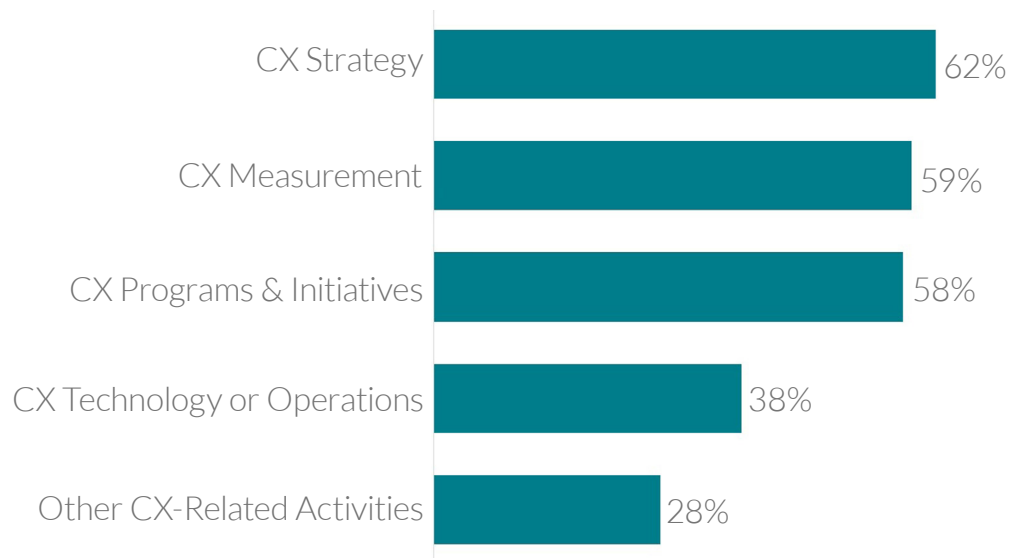


Survey Demographics & Firmographics

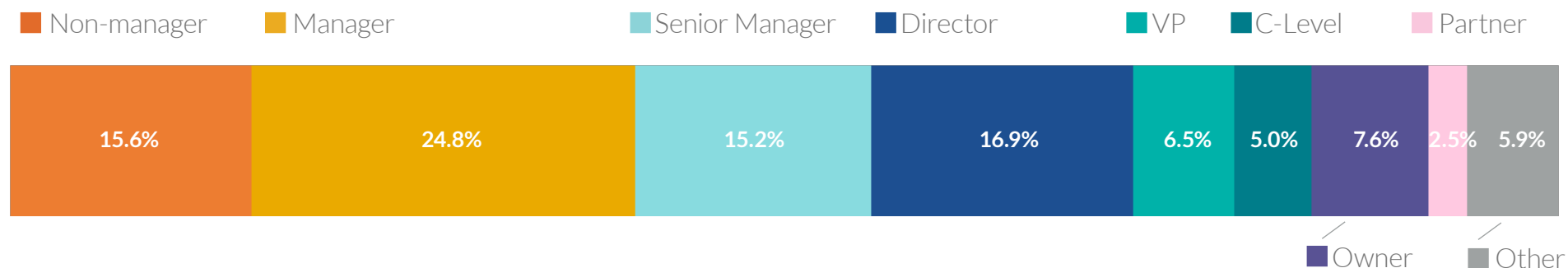
JOB FUNCTION OR DEPARTMENT

CX.....	29.2%
Marketing.....	13.2%
Customer Service or Support.....	8.7%
Customer Insights.....	7.1%
Owner/Founder/President/CEO.....	7.0%
Analytics/BI.....	6.0%
Product Management.....	5.7%
Sales.....	5.3%
IT.....	4.4%
Systems/Solutions/Operations.....	3.6%
R&D.....	0.9%
Finance.....	0.7%
Other.....	8.0%

CX ROLES AND RESPONSIBILITIES



SENIORITY LEVEL





Manage, measure and improve your customers' journeys

Pointillist enables CX, analytics and marketing teams to connect the dots between customer experience and business success. Customer-centric enterprises rely on Pointillist to:

- Aggregate customer data from any source
- Advance from touchpoint analysis to Customer Journey Management
- Analyze journey-based metrics and KPIs
- Identify the root causes of underperforming journeys using AI
- Orchestrate actions that maximize journey success

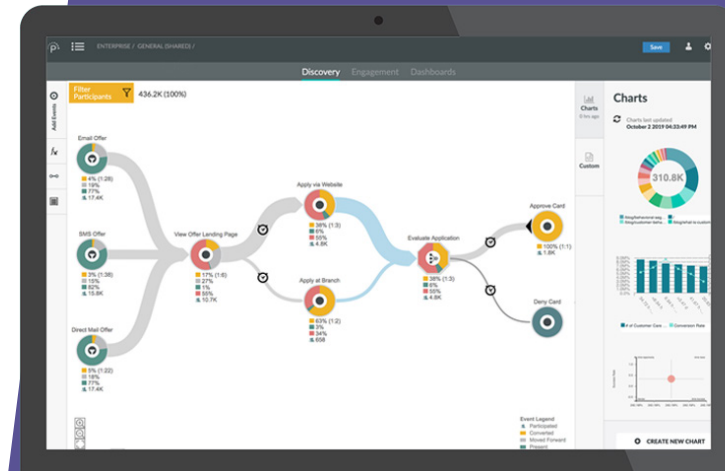
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